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ABSTRACT

The use of target setting in conjunction with good information systems in colleges and work-based learning (WBL) providers can lead to improved service provisions across the sector in the United Kingdom. Target setting must be carried out in a systematic way in which providers must develop target- setting processes with a focus on learner success; self-assessment and development planning; effective processes for setting retention and achievement targets; identifying and developing other targets; the timeliness and accuracy of underpinning data; and the information needs of course managers. Target setting health checks, which have led to considerable improvements in the way that organizations use target setting, are provided for both colleges and WBL providers. Information systems facilitate target setting, and a culture of openness in which the aim of an organization is to have organization information (OI) rather than management information (MI) is a key precondition for an effective information system. Recommendations for effective OI are as follows: OI needs support from the top; the senior manager is key; MI must be OI; OI is a service for all staff; good OI depends on an open information policy; everyone is responsible for data accuracy; and the more data are used, the more accurate they will be. (MO)

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hitting the target

target setting and information systems for the learning and skills sector

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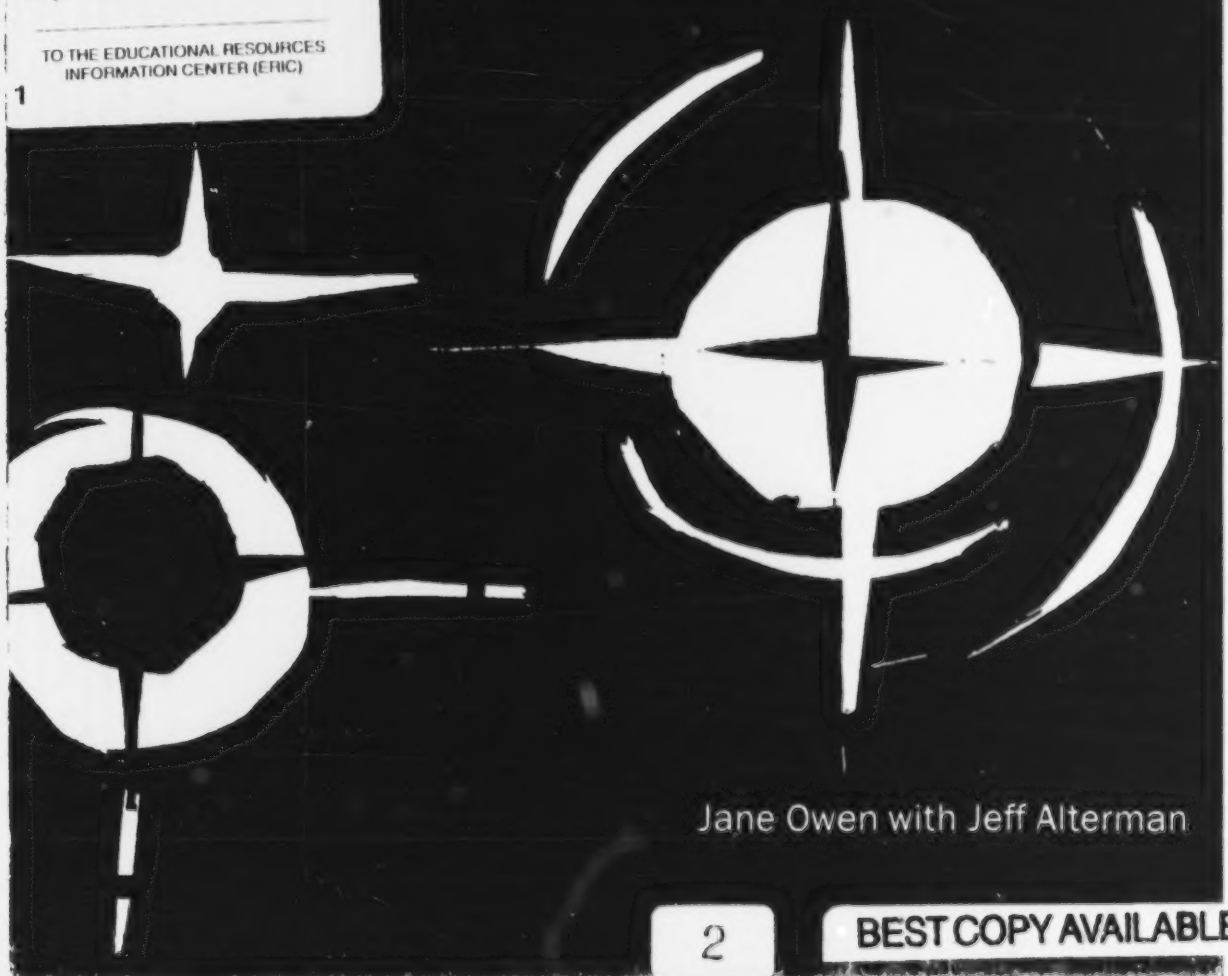

Jane Owen with Jeff Alterman

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raising quality
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The Raising Quality and Achievement Programme is run by the Learning and Skills Development Agency in partnership with the Association of Colleges and the Centre for Economic and Social Inclusion.

- We aim to reach all colleges and work-based learning providers.
- We offer extra support to colleges and work-based learning providers that are receiving Standards Fund money to improve their practice.
- All our activity themes are backed by a programme of research and evaluation.
- The Raising Quality and Achievement Programme is funded by a grant to the Learning and Skills Development Agency from the Learning and Skills Council.

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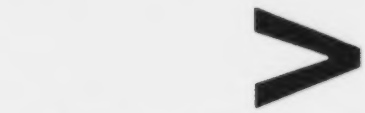

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Introduction

Success for all emphasises the government's commitment to the use of target setting to improve service provision across the sector. The first part of this plain English guide is intended to give learning and skills providers a starting point for reviewing their target-setting processes. It includes two health checks – one for colleges and one for work-based learning (WBL) providers and lists some of the key issues raised as a result of providers using the heath checks.

The successful use of targets is intrinsically tied to good information systems and the second part of this guide covers information systems, setting out practical information and examples of good practice. It is aimed at staff at all levels. It shows some of the ways in which learning and skills providers have made the most of information and ensured its accuracy. As it is not a technical guide, people with little IT knowledge will also gain from it.

Many learning and skills providers have established good practice for information systems. To identify some of this good practice we initially contacted 10 colleges that were accredited, had received excellent inspection reports or were beacon colleges and were able to share their learning with us.

A consultant visited each of them and spoke to staff at different levels throughout the college. The learning from this was then discussed at an invitation event with representatives of the colleges taking part. The one-day event confirmed much of the anecdotal feedback. The key message was that the differences between successful and unsuccessful systems lie in the people processes.

Over the past two years, we have also visited work-based learning providers and colleges through the LSDA Raising Quality and Achievement (RQA) Programme target-setting projects and run sessions at seminars. These projects gave us considerable insight into the current situation and we have drawn on them as part of this guide.

Unfortunately there is no 'magic wand', 'one size fits all' solution to meeting an organisation's information needs but we hope that by learning about strategies that others have used you will be able to identify realistic ways to develop your own strategies.

An important point for you to consider is that no matter how well your system operates you can always learn from others. To help with this the guide contains practical examples from learning and skills providers. These are laid out in shaded boxes.

Key messages of good practice

Target setting

- Effective target setting is treated as a process rather than an event and is not solely a 'top-down' exercise.
- Target setting for recruitment, retention and achievement is an outcome of course review involving curriculum teams.
- Target setting is an integral part of self-assessment and development planning. Actions identified to address weaknesses and achieve quality improvement underpin the key targets set.
- Good communication between quality managers and information managers helps to ensure that information systems provide evidence for self-assessment and development planning and target setting.
- Targets are supported by defined data collection, information provision and monitoring processes.
- Colleges and providers use a range of 'other' targets as is appropriate to their own priorities. These include targets at a variety of levels (eg student, programme, department, whole college) for attendance, punctuality, value-added, additional learning support, progression, initial assessment, learner review, internal and external verifier (IV and EV) performance, conversion rates (eg from student acceptance of a place to show at the start of the course).
- Many colleges and providers are now making use of the grades from internal teacher observation schemes to identify areas for improvement and to set challenging observation-grade targets.
- Targets related to plans for improvement that result from 'listening' to learners or employers or parents are also being more widely used.

Key messages of good practice

Information systems

- The senior manager and senior management team (SMT) must be seen to give clear and unequivocal support for the organisation's information system 'from the top'.
- Information should be regarded as organisation information (OI) not management information (MI).
- Centrally held data is the only true data.
- Learning and skills providers must involve staff to clearly establish what is wanted from the system before working on any OI development.
- The more access staff have to data, and the more they use it, the more accurate it will be.
- Learning and skills providers should document and review their OI procedures.
- Staff should be trained to make good use of information technology (IT) and information.
- Learning and skills providers should establish and maintain a good relationship with their IT software suppliers but also make sure they receive a service which meets their information needs.
- Learning and skills providers should share good practice and network with other colleges and other organisations.

Target setting

Target setting will not work in isolation. It must be carried out in a systematic way, using procedures that support the whole process.

Providers need to develop these target-setting processes with a focus on:

- the *Success for all* requirements and LSC circular 03/09
- the Common Inspection Framework particularly the 'Leadership and Management' section
- learner success – how do we measure success and how do we set targets for success?
- self-assessment and development planning – how do we incorporate target setting into the self-assessment and development-planning process?
- effective processes for setting retention and achievement targets – are targets set in a systematic way, is target setting a process which involves curriculum staff and not just 'top-down', and are targets linked to real changes in curriculum delivery and/or student support to achieve improvement?
- identifying and developing other targets – are targets restricted to prescribed targets or do they also focus on the needs of the learners and provider's own local issues?
- the timeliness and accuracy of underpinning data – how regularly is data updated, who ensures its accuracy?
- the information needs of course managers – do the targets and the supporting data help the ongoing provision of services to learners?

Issues within the sector

There continue to be issues about target setting within the sector that need to be considered.

Problems around data accuracy and access persist. There continues to be an inconsistent use of benchmarks and three-year trend data, though this depends on where within the organisation people work. Much of the effectiveness of data use depends on how easily staff can access the data and the management attitude to data and targets.

Many providers do not have systematic management processes. This lack of system does not just apply to the methodology used but to the timing of the target-setting process. In addition to setting the targets, providers must also establish how they will meet them and put processes in place to support the plans.

Links to self-assessment and development planning are not always strong enough, even though target setting can provide an excellent opportunity to focus action to improve. It is important that targets do not become a wasted opportunity by being set in a vacuum. They should form an integrated part of the management and planning cycle of the organisation.

Quality targets continue to have less impact than financial targets. This may be because financial targets have been operating for longer, because of the focus on the 'bottom line' in most organisations, or because of the relative accuracy and availability of financial data compared with data for quality. There needs to be a stronger focus on quality targets.

Target setting may be top-down and mechanistic. There is often weak linkage between course and college targets. There are some examples of very good practice within the sector but they need to become more widespread.

Too many providers still undertake relatively little exploration of quality targets beyond recruitment, retention and achievement.

Using a health check to improve target setting

Though there are still target-setting weaknesses within the sector we have found that providers have made significant progress. Using the health-check consultancy – a service offered through the LSDA RQA Programme, providers have made considerable improvements to the way that they use target setting, such as the following.

Improving the processes for data collection and also access to and ownership of the retention and achievement information

- timeliness and completeness of achievement data collection
- access for curriculum managers to 'kitemarked' software and the drill-down facilities within the software (colleges only)

Revising the target-setting processes at all levels within the organisation

- defining the roles of senior and curriculum managers – top-down / bottom-up processes
- establishing an organisation-wide calendar to meet internal and LSC requirements

Linking course review to self-assessment and development planning

- use of benchmarks / three-year data
- use of smart targets throughout the plan
- setting and meeting targets a key strength

Identifying other key target areas

- attendance and punctuality
- value-added
- learner targets and individual learning plans (ILPs)
- teacher observation
- student feedback.

Comments from staff who have used the health-check methodology include :

It gave curriculum managers confidence to tackle MIS issues.

Quality manager

It stimulated the debate on targets across college.

Senior manager

Made me think about my role in setting and reviewing targets.

Senior manager

Helped me recognise the need to work with curriculum managers to identify internal quality information needs.

MIS manager

Target-setting health check for colleges

How would you rate the effectiveness and importance of each of the questions to your college at present on a scale 1–5 where 1 is Very effective / Important and 5 is Ineffective / Unimportant?

	Area	Effectiveness	Importance
1	College structure and strategy		
2	How reliable is your data?		
2.1	Individualised student record / Individualised learner record		
2.2	Are you making full use of benchmarking data?		
2.3	Kitemarked software		
3	Process and timing of target setting		
4	Presenting targets		
5	New targets		

Core Retention and achievement

1	**College structures and strategy**
	Who has overall management responsibilities for the target-setting and delivery processes?
	How far do these responsibilities extend down the college's management structures?
	Are these responsibilities well documented, eg in job descriptions?
	How is target-setting performance evaluated in the self-assessment and development plan?
	Do your targets relate directly to the actions identified in the self-assessment and development plan?

2 How reliable is your data?	
2.1 **Individualised student record/ Individualised learner record (ISR/ILR)**	
Is the ISR / ILR completed accurately and on time?	
Do you ensure that there is a close correlation between register data and the information system (eg register audits against information system qualification / learner aim data to check for missed withdrawals)?	
Do you correlate exam entries with MIS student data?	
How do you monitor achievement collection?	
☐ achievement checks when results arrive – missing withdrawals	
☐ results with no entries	
☐ non-certificated qualifications	
Do you make full use of your ISR / ILR credibility checks and CAATs reports?	
2.2 **Are you making full use of benchmarking data?**	
Using national benchmark data which tables do you use?	
Do you make use of quartile rankings?	
Do you make use of qualification-level benchmarks	
☐ from website	
☐ from kitemarked software?	
How do you analyse performance? By:	
☐ whole college?	
☐ department?	
☐ course?	
☐ programme area?	
☐ NVQ level?	

2.3	**Kitemarked software**	
	Are you using kitemarked software for analysing previous performance:	
	☐ as per FEFC / LSC format	
	☐ to provide access to data – do curriculum managers access kitemarked software reports?	
	Does your software allow curriculum managers (at different levels) to drill down from whole college to individual student level?	
	How would you rate your current software in user-friendliness to curriculum and other staff?	
3	**Process and timing of target setting**	
	What is your schedule for target setting?	
	Is it linked to college needs (eg strategic planning)?	
	Is it only linked to LSC deadlines?	
	Are targets set at course level?	
	Are targets set with most up-to-date information?	
	Are targets set with reference to national and individual qualification aim benchmarks (and local or other)?	
	Do targets link to strengths and weaknesses identified through self-assessment?	
	Are the targets included in college self-assessment and development plans?	
	Are targets linked to strategies for retention and achievement including improvements to the delivery of teaching and learning?	
	Who is involved in setting targets – is the process top-down, bottom-up or both?	
	Who approves the targets – academic board, governing body?	
	Who takes responsibility for delivering targets?	
	What happens if targets aren't met?	
	How 'real' do you think your targets are?	

4 **Presenting targets (and providing contextual information)**	
To whom do you present college targets?	
Do you present targets graphically as well as in tabular form?	
Is there just one set of 'college data'?	
At what levels do you present targets? (college aggregate level, departmental level, NVQ level, course level)?	
Do you present a 3-year trend in previous outcomes based solely on ISR / ILR data?	
Do you present a report that shows how good you were at target setting last year (ie targets versus outcomes)?	
Do you present outcomes and targets against national benchmarks (or another agreed set of benchmarks)?	
Does your governing body or sub-committee have the opportunity to look at course / department information?	
Do you try to present data to the governing body in a way that supports them in understanding and approving targets?	
When management or the governing body considers targets do they also consider 'adequacy of resources' to achieve them?	

5	**Looking to the future? New targets**	
5.1	**Other targets?**	
	Do you set targets in other areas? Which?	
	How are these targets published / publicised?	
	Do you have a strategy for implementation of other targets?	
	What targets have you identified as a priority to develop (see LSC circular 03/09, Common Inspection Framework and Performance Review)?	
	Who determines 'other' targets?	
	Do you include an assessment of target-setting performance within your Self-Assessment and Development Plan?	
	Do you set targets for all learners?	
5.2	**LSC circular 03/09 indicates the need for 3-year targets for learner numbers, employer engagement, successful completion rates and trainer qualifications.** How are you planning to develop target-setting processes in these areas? Who will be involved in your 3-year development plan?	
	Specific focus for the health-check visit?	
	For each target you have or would like to develop:	
	◻ What is the target?	
	◻ Who sets the target?	
	◻ Who is involved in the process of setting the target?	
	◻ What data is required and how is it collected?	
	◻ What benchmarks do you use in setting the target (internal / external)?	
	◻ Who monitors the target and how often?	
	◻ How is information on target performance accessed?	
	◻ Is the target included in the college self-assessment and development plan?	

Target-setting health check for WBL providers

How would you rate the effectiveness and importance of each of the questions to your organisation at present on a scale 1–5 where 1 is Very effective / Important and 5 is Ineffective / Unimportant?

	Area	Effectiveness	Importance
1	Organisation structure and strategy		
2	How reliable is your data?		
2.1	LSC returns		
2.2	Analysing recruitment, retention and achievement performance		
3	Process and timing of target setting		
4	Presenting targets		
5	New targets		

ore Retention and achievement

1 **Organisation structure and strategy**	
Who has overall management responsibilities for the target-setting and delivery processes?	
How far do these responsibilities extend down the organisation's management structures?	
Are these responsibilities well documented, eg in job descriptions?	
How is target-setting performance evaluated in the self-assessment and development plan?	
Do your targets relate directly to the actions identified in the self-assessment and development plan?	

2	**How reliable is your data?**	
2.1	**LSC returns**	
	Are data returns completed accurately and on time?	
	Do you ensure that there is data cleansing between central data (qualifications studied, withdrawals, achievements) and locally held information (eg registers, ILPs)?	
	Do you correlate accreditation for awards (NVQs, key skills, technical certificates, basic skills tests) with central student data?	
	How do you monitor the collection of achievement data?	
	What checks occur when results arrive eg missing withdrawals, results with no entries?	
2.2	**Analysing recruitment, retention and achievement performance**	
	Do you use the Adult Learning Inspectorate (ALI) inspection spreadsheets on a regular basis to monitor your performance?	
	How do you analyse performance? By:	
	☐ whole organisation?	
	☐ department?	
	☐ programme area?	
	☐ NVQ level?	
	Does your software allow curriculum managers (at different levels) to drill down from whole organisation to individual student level?	
	How would you rate your current software in user-friendliness to curriculum and other staff?	

Target-setting health check for WBL providers **continued**

3 **Process and timing of target setting**	
What is your schedule for target setting?	
Is it linked to organisation needs (eg strategic planning)?	
Is it only linked to LSC deadlines?	
Are targets set at programme level?	
Are targets set with most up-to-date information?	
Do targets link to strengths and weaknesses identified through self-assessment?	
Are the targets included in organisation self-assessment and development plans?	
Are targets linked to strategies for retention and achievement including improvements to the delivery of teaching and learning?	
Who is involved in setting targets – is the process top-down, bottom-up or both?	
Who approves the targets?	
Who takes responsibility for delivering targets?	
What happens if targets aren't met?	
How 'real' do you think your targets are?	

4 **Presenting targets (and providing contextual information)**	
To whom do you present organisation targets?	
Do you present targets graphically as well as in tabular form?	
Is there just one set of 'organisation data'?	
At what levels do you present targets (organisation level, departmental level, NVQ level, programme level)?	
Do you present a 3-year trend on previous outcomes based solely on central data?	
Do you present a report that shows how good you were at target setting last year (ie targets versus outcomes)?	
Do you present outcomes and targets against national benchmarks (or another agreed set of benchmarks)?	
When management considers targets do they also consider 'adequacy of resources' to achieve them?	

5	**Looking to the future? New targets**	
5.1	**Other targets?**	
	Do you set targets in other areas? Which?	
	How are these targets published / publicised?	
	Do you have a strategy for implementation of other targets?	
	What targets have you identified as a priority to develop (see LSC circular 03/09, Common Inspection Framework and Performance Review)?	
	Who determines 'other' targets?	
	Do you include an assessment of target-setting performance within your Self-Assessment and Development Plan?	
	Do you set targets for all trainees / trainers?	
5.2	**LSC circular 03/09 indicates the need for 3-year targets for learner numbers, employer engagement, successful completion rates and trainer qualifications.** How are you planning to develop target-setting processes in these areas? Who will be involved in your 3-year development plan?	
	Specific focus for the health-check visit?	
	For each target you have or would like to develop:	
□	What is the target?	
□	Who sets the target?	
□	Who is involved in the process of setting the target?	
□	What data is required and how is it collected?	
□	Do you use benchmarks in setting the target (internal / external)?	
□	Who monitors the target and how often?	
□	How is information on target performance accessed?	
□	Is the target included in the organisation self assessment and development plan?	

Information systems: organisation information

Vision, culture and the role of management

A culture of openness is a key precondition for an effective information system. The information vision must be led and maintained by the senior manager and be embedded in the thinking and actions of the whole senior management team.

The symbolism of the term used to describe a provider's information strategy is itself powerful. The aim is effective **organisation** information (OI) as opposed to **management** information (MI). The term 'management information' tends to send the message that the information is owned by and for the use of managers. The truth is that organisation information is there to support everyone in the organisation and its accuracy is everyone's responsibility.

Clear key messages should be transmitted to all staff and reinforced by the senior manager's actions. Messages to be considered are listed below.

- In any development phase, such as the spread of IT and information learning technology (ILT) in post-16 providers, there are few experts and, since the development affects everyone, everyone has to learn and adapt.
- OI is a **service** made available for everyone who works in the organisation.
- IT is not going to go away.

The energy and resources put into implementation send an unequivocal message to staff about the importance of organisation information.

In best practice, there is a clear culture of prioritising OI and making it available to everyone on the staff. An 'open access to data' policy is a natural part of this.

Senior managers must lead in defining what is wanted from the system before the work of OI development is started. In most cases where this was done successfully, it was initially prioritised around punctual and accurate returns to the funding body but quickly encompassed many of the day-to-day information needs of the organisation.

The importance of the senior manager as a driver of the OI

The following extracts are summarised from a paper produced by a college principal.

The principles of management employed in the college are:

- openness
- honesty
- decisions based on accurate information
- delegation within effective arrangements for control.

The effectiveness of OI is essential to accountability and effective internal management.

- Managers and staff are responsible for the accuracy of data.
- Central OI staff responsibility is to provide systems and structures within which managers and staff can own data.
- Centrally held data is the only true data. Data is validated by other data.
- Centrally held data is used for the purposes of accountability and for internal management.

Thus the aims for OI might include:

- online enrolment
- a student tracking system – online withdrawal, online achievement
- a register system to track student attendance and punctuality, room use, staff use
- online reporting of the financial system
- a personnel system
- library management
- planning.

The senior manager's role in development

From the start of developing the new system, senior management set down some basic parameters, for example that there would be no on-screen menus. Instead there had to be:

- press-button access to data
- a simple, flexible system for reading and input
- a secure master system and a 'mirror' / slave for daily use linked by overnight processing of up-to-date data.

The simple but effective view that organisations should display a strong information vision as part of communication came directly from the senior manager. This was reflected in a new post of information and communication manager.

Managers are able to emphasise the importance of organisation information by their actions and by the resources they provide for it. They can:

- highlight the need to spread expertise in accessing data and try to find ways of promoting the use of organisation information and of IT in general
- emphasise that college information will become more accurate and reliable the more it is used.

Promoting the use of OI and IT

One learning and skills provider offers a range of benefits (see below) to staff to help them with computing and to encourage commitment to OI.

- PCs complete with software and a free internet connection are given to staff with sizeable teaching commitments to use at home. For those who already have a PC, alternative hardware is given.
- European Computer Driving Licence (ECDL) training is made compulsory but tailored to what staff will need on the job.
- The senior manager will not accept paper memos from staff. They must be on e-mail (or of course in person).
- The senior manager requires all schemes of work to be on the intranet by a given date – and updated thereafter.

In another learning and skills provider the key management team meeting has the operation of OI on every agenda.

It is important that the senior manager and senior management team are seen to give clear and unequivocal support from the top. There should be no doubt that they value OI and the staff who deliver it. There should also be absolute support for the OI team from the SMT and management must maintain that centrally held data is the only correct data.

The following comment came from a senior manager on the role of management in establishing a culture of confidence in OI:
'Any weakness (for example, open criticism by me of the MI team) and the heads of school would have trampled all over the MI team.'

A clear message emerging from the research was that information equals communication.

Basing the organisation plan on fact

One learning and skills provider appointed an information and communication manager whose first job was to conduct a communication audit and an information audit. These led to an action plan for the whole organisation.

From a college's communication audit:

Any proposed changes to the way the college communicates internally and externally must entail amendments to the nature and distribution of information that is being communicated. It follows that there needs to be a review of the way information is gathered, stored, manipulated and generated; of the nature and frequency of reporting; and of the individual staff development and responsibilities in this area.

Furthermore the increased importance of the college database in the light of its direct relationship to funding demands that any information stored is detailed, accurate, complete and up-to-date. This principle underlies the identification, collection, analysis, manipulation and distribution of appropriate information and must guide any review and subsequent recommendations pertaining to it.

Recommendations

The following recommendations came from the visits and seminars. It is well worth considering each of them.

- Develop a coordinator role to maximise the effective use of accurate data.
- Create a 'reporting calendar' that identifies and prescribes the full annual cycle of all centrally generated reports. It should include: report title and general content, recipients, date of issue, purpose and responsibility.
- Review access rights to centrally stored data on a read-only basis.
- Develop a clearly defined process of access, promoting data protection and general security of information.
- Develop staff skills in inputting, accessing and using centrally stored data.
- Consider what new reports are needed by your organisation, for example, bi-termly retention reports for programme team leaders.
- Increase awareness and use of networked 'template' documentation, eg profiles, change of course forms, estimated grade forms.
- Rename the reception 'information centre'.

In summary

- OI needs support from the top.
- The senior manager is key.
- Management information must be organisation information.
- OI is a service for all staff.
- Good OI depends on an open information policy.
- Everyone is responsible for data accuracy.
- The more data is used the more accurate it will be.

Information system infrastructure

Elsewhere in this guide we have stressed the importance of clear vision, policy and procedures for information. We have also suggested that a powerful signal of the importance of information lies in the use of the term '**organisation information**' rather than the more common 'management information'.

With these in place it is theoretically possible, at least in smaller learning and skills providers, to have an almost totally paper-based information system, with perhaps software just to do final analysis and external reports. However, this is not a situation to be recommended, even for the smallest college, as online up-to-date data will always be more valuable to staff.

If staff are to access data, they must have a mechanism that allows them use of up-to-date information in an easily understandable form. Traditionally this might have been paper but an intranet offers a much more effective alternative.

In-house database

In one learning and skills provider, a 'home-written' database called 'The timetable' has been built up over six years; data from the main system is downloaded into it on a weekly basis.

The existence of an organisation-wide area network can be invaluable in promoting the effective use of OI. Issues such as the extent to which a site is cabled and whether remote centres are also online are also important.

Online assessment

This learning and skills provider has a live, online collection of data, called the staff folder system, in which all materials relating to self-assessment, target setting and benchmarking are immediately available.

At their last inspection, no paper was produced for inspectors; instead a briefing meeting and initial training was provided. PCs were made available for each inspector. CDs of relevant data were produced ahead of time for inspectors to use. There were hyperlinks (underlined key words that direct you to related information when you click on them) between self-assessment materials and evidence and there was three years of evidence online. Work on hyperlinking for inspection took three months. However, from now on they feel they will never again need to jump through hoops for inspection. Staff folders will contain, as a matter of course, all the updated information needed.

Without sufficient hardware to allow organisation-wide access the information, no matter how well presented, will not truly become organisation information. The ratio of networked PCs to staff is a major factor in access to data and acquiring information.

Remember that while there may be nothing to equal face-to-face contact, internal e-mail is a much more effective and speedy way of communicating than paper memoranda.

Access to PCs

In one college, the existence of a PC in every teaching room was seen as the key to effective attendance monitoring. Some 90 teaching rooms were already equipped, allowing full-time students' attendance to be input straight to the student record.

In a number of learning and skills providers, PCs or laptops have been issued to staff with a relatively high teaching commitment – a clear signal of the importance of using electronic communication and vastly increasing access to data published on the staff network. If you are considering following this example remember that additional use of the system will have a knock-on effect on the effectiveness of the server. The capacity of the network server needs to be carefully monitored so that the increased use of the system does not drastically slow down its operation.

There are many examples of learning and skills providers using innovative software solutions to support the infrastructure, by working alone or in conjunction with other providers. Solutions can then be shared with others.

Working with others

Four learning and skills providers worked together to develop an executive information system (EIS). This is software that delivers easy access to a suite of reports that provides managers and staff with a rapid overview of organisation performance in key defined areas.

New system development

A system developed in one college but of obvious use to all was written by the college OI manager and an external software house. It tracks achievement against benchmarks and has an excellent drill-down facility (to let you disaggregate data).

It has been sold to around 120 colleges.

In summary

- Staff must have access to the data through networked hardware.
- Staff development must be informed by the OI strategy.
- Online, real-time data benefits staff as well as the organisation.

Policy

A well-developed information policy will always affect the successful use of organisation information. Some learning and skills providers maintain a written information policy; others have their information policy embedded both in the general management culture and in the quality policy and procedures. Regardless of the approach, those that have useful organisation information systems always address information somewhere in their policies.

In the words of one senior manager: 'We live the policy.'

Some key elements of policy should interface closely with the OI vision, particularly absolute support from the senior manager for the OI team. This is especially important in the early days of developing the OI system when there will inevitably be glitches in operation.

New policy sometimes emerges out of poor experiences with previous OI software and the determination to find more effective software solutions. Here, issues like working out the key aims for a new system (for example, one that is simple, immediate, networkable) may form an essential part of the policy.

Practical policies for development

In its search for new software, one learning and skills provider resolved only to see actual software, not demonstration promises. The requirement was adopted as a policy for all software procurement. (See also *Relationship with suppliers* on page 42.)

Access to data and openness is an important policy principle. Information should be freely accessible by all relevant staff and be used on a daily basis not simply stored away. The development of an intranet to which everyone has easy access might become a policy issue as a result. In one college this approach to openness manifested itself in a new lecturer's remark that there were 'no secrets at the college'.

Open availability of data

Key performance data is published every two weeks in *College news*.

The college network lists such items as:

- actual staff teaching hours (against those planned), compiled on a daily basis from register data
- classes with less than the targeted attendance
- student achievement against targets
- withdrawal and retention statistics
- 'league tables' of college schools of study and their performance.

On the rare occasions when the principal had to talk to staff about possible redundancies, he could comfortably refer to the freely available information on the system. The staff knew the data as well as the principal did.

The information policy is inseparable from the quality process in many learning and skills providers. This can be seen in two ways: the self-assessment processes are totally dependent on access to accurate and up-to-date data and the OI system itself is one of the service areas subject to rigorous review.

Quality /IT links – data checks

The quality manager, who has well-developed IT skills, has a key role in calling people to account for missing data. He was also key in defining the information requirement at all levels of college operation.

Quality /IT links – self assessment

Documentation, procedures and results of self-assessment are published online to all staff – and all data for self-assessment is accessed directly from the staff database.

Quality /IT links

The quality manager manages the 'Staff folders' database. This is an online, intranet service for staff that holds all published data, both for the current year and for the past three years. The system also holds details of quality processes including self-assessment forms completed by each curriculum and service group, and published for all to read. 'Staff folders' also holds all standing instructions and procedures.

Finally, policy on OI must state that there is only one legitimate set of data – that held on the central OI record. There must be no secondary sets located, for example, at site or department level. The benefits of collecting and recording information accurately and often must be made obvious to staff for this to work.

In summary

- Learning and skills providers need an information policy.
- A policy of openness is vital for good OI.
- Successful information policies are closely linked with quality policies.
- Central data is the only data.

Procedures

Mapping and documenting the procedures underpinning the OI is an essential aspect of good practice. The initial work of fully understanding and recording these procedures helps staff to understand how the system works and will explain why they need to meet deadlines and assure accuracy. Documented procedures also give a framework for review and development of OI.

It is also important that there is continuity in the procedures, that they are built up and reviewed over time and that they are based on processes familiar to staff. Producing clearly understood and universally accepted procedures facilitates greater use of OI and leads to greater accuracy of the data. Ideally everyone in the organisation should be involved in data capture and data use.

Dramatic change is generally less preferable – though there are times when 'step change' is essential if a radical overhaul of OI or a part of its system is required.

Key areas that may need agreed procedures

- Enquiries
- Applications
- Enrolment
- Qualifications on-entry
- Achievements on-programme
- Attendance registration
- New staff induction
- Review and self-assessment procedures
- Review procedures for OI
- Withdrawal and change of programme
- Accessing available reports
- Calendar of reports (if appropriate – some organisations have standard reports live on the network at all times)
- Requesting of bespoke reports (including performance targets for service)
- Destinations / Progressions

Not all learning and skills providers have discrete OI procedures. Like OI policy, these are sometimes embedded in the quality framework. In some they exist in a paper-based manual of procedures, each with clearly identified review and performance targets. They also are commonly found embedded in networked systems – possibly as help menus available for each section in a database.

Development and use of an intranet for publishing college procedures

This provider makes extensive use of an intranet for publishing all procedures. All procedures are kept up to date. As a result access to and awareness of procedures is high among staff.

In summary

- Mapping and documenting OI procedures help staff to understand the system.
- Documented procedures give an excellent basis for ongoing review.

Regular review

An important part of ensuring that an OI system provides for the needs of the organisation is establishing a formalised method for reviewing the entire information system. In some learning and skills providers there is a formal and overt system for reviewing OI by means of an organisation-wide user group. In others, it is more *ad hoc*, embedded in the whole OI system and reviewed through constant use.

Senior management teams should take a leading role in this review process and maintain a high level of awareness of OI use and development needs. Parameters may be centrally set but it should be emphasised that it is the duty of everyone to participate in the review of the quality of the OI.

The review of OI can also be covered by the organisation's quality procedures when a formal review of OI takes place alongside that of all other services as part of self-assessment. It should also take into account the organisation-wide use of the system and comprehensively address the areas examined and the staff users consulted.

Using all staff for review

In one learning and skills provider, the system users group had nominated representatives from key areas of the organisation but was also open to anyone else who had an interest in joining.

The OI review and production of a development plan should inform the strategic plan, although for many learning and skills providers OI development will itself be one of the strategic priorities.

We recommend that learning and skills providers take advantage of any opportunity for informal review of the system that might exist in external groups to which they belong.

In summary

- OI must be regularly reviewed.
- OI review should inform the strategic plan.
- Make use of external opportunities for review.

Auditing data

A fundamental principle for OI promoted by this guide is that **centrally held data is the only true data**.

Sometimes staff don't trust centrally held data, and so keep their own set of records. This information, however, does not get passed on to other staff and is not verified by other sources.

To enforce the principle of using centrally held data it is essential that the data is accurate.

Learning and skills providers invest a great deal of time in auditing data – checking and sometimes rechecking to ensure it is correct. Perhaps too often this is done by issuing specific lists to be checked and returned, in other words by some form of formal review.

Best practice occurs when data is audited continuously during its use by as many people as possible. By being visible and by being checked in everyday use, the data becomes 'self-cleansing'.

Electronic register systems can be powerful data auditing tools when regularly used. Downloading a class list from the student record provides several opportunities for cleansing data. The teachers and trainers can use it as a register for a class meeting, collecting data on a daily basis. At the same time the data will give accurate information about a learner's enrolment, attendance (for pastoral purposes) and withdrawal. The organisation also gains information on overall room use and staff teaching hours.

Similarly, organisations that use their information system to generate re-enrolment forms and learning agreements considerably reduce form filling. Learners simply endorse existing information by means of one signature. This helps ensure that the centrally held data is correct. Examination and assessment entry forms produced from the information system will similarly ensure that learners are entered for the correct assessment and that only these learners will be expected to have achievement data entered against their name.

A key element in the achievement of clean data and staff motivation to contribute new data is a rapid turnaround on amendments. Confidence in OI will inevitably suffer when a withdrawn learner's name remains on a register for weeks after they have left.

In colleges, access to kitemarked software for monitoring retention and achievement (with drill-down to individual student data) by curriculum managers is seen to enhance 'data ownership' significantly and create real commitment to data hygiene.

Work to gain enthusiastic staff support. If staff understand the benefits of good data **they** drive the development of new OI. Remember that if the review and self-assessment processes rely on detailed and accurate data, these key processes will then drive the OI.

All staff to use data

Everyone, not just the OIS team, should see the benefit of up-to-date data. One manager commented, 'Because it's genuine data we can ask the questions and trust the answers.'

Data forms an integral part of management

At one learning and skills provider quarterly performance monitoring meetings (for programmes and service areas), twice-yearly, small-group meetings of staff with the senior manager and the work of the internal audit team (reviewing 90 programmes a year) form the core of the organisation's management. They all demand detailed, timely and easily accessed data.

Finally, learning and skills providers must publish data as widely as possible to ensure everyone's participation in the information process and everyone's chance of benefiting from good information. This will only come from a genuine open information policy.

The senior manager is involved in using the data

All programme managers meet the senior manager directly four times per year to review course performance in recruitment, retention, attendance, punctuality and achievement. A 'culture of accountability' exists at programme manager level that ensures a commitment to data accuracy.

In summary

- Staff must trust the data.
- Regularly used data becomes self-cleansing.
- Widely used data becomes self-cleansing.

Development of OI
(including staff development and training)

Organisations that have used OI successfully usually have an extremely focused approach to development. This means that vision and policy are translated into development strategies, which then feature strongly within the organisation's strategic plans.

When developing OI, a significant initial issue for these organisations is often prioritising resources for hardware, infrastructure and software. Information managers usually have close links with the 'technology' manager, working very closely together on strategic planning issues. The key to the ongoing development of their OI is less 'technology focused' and much more dependent on 'people-focused' activities.

Two fundamental features of success are:

- good communication between staff and breaking down departmental barriers: this entails a focus on good communication, extensive consultation and, in most cases, active user groups involving staff from across the organisation

The role of an information strategy user group

The learning and skills provider ensured that information requirements were identified via a cross-organisation user group that contained membership representing teaching, training and business support staff at different levels. The group met to consider the usefulness or otherwise of current reports and means of access to them, and to prioritise future information requirements.

- staff development which includes a focus on OI as part of the initial induction on joining the college.

New staff induction

The learning and skills provider had developed an administration pack that was supplied to all new staff as part of induction. The pack contains internal forms and guidance notes.

In addition over 120 staff had attended workshops arranged to brief staff on data capture processes and information availability.

Teaching, training and business support staff require not only good communication but specific development on data capture procedures and on identifying and accessing information. Some simple ways to promote the development of staff skills are:

- encourage staff to use e-mail
- discourage paper memos and forms
- equip staff with PCs and laptops
- use external training drivers such as the European Computer Driving Licence
- train staff in the best use of the IT tools available
- provide time for staff to maintain records.

Online access for all staff

The learning and skills provider had ensured that online access existed for all staff and had a policy that staff are responsible for accessing information themselves rather than expecting a paper-based information delivery service.

Curriculum and course managers, teachers and trainers should have key roles in developing both the learner information systems and the information outputs.

Membership of the local OIS group

The OIS manager attended a bi-monthly meeting of some 30 learning and skills providers at which issues of common concern were discussed and good practice shared.

Membership of a supplier-based consortium

The college belonged to a group of colleges undergoing a major system change. The colleges agreed that each would take responsibility for an aspect of the change and then provide support to the other members of the group.

Many of the learning and skills providers we spoke to stressed the importance of their relationship with the supplier of learner information system software in **planning** the development of organisation information.

Several of the issues highlighted were around timescales for new software releases and the significant detrimental effect of software upgrades on existing OI delivery. Software suppliers were often more valuable in ensuring that tools were available for developing the organisation's own information 'front ends' or 'executive information systems' than in supplying suites of predetermined reports as part of their packages.

Learning and skills providers we spoke to used a variety of reporting tools to extract information and present it to staff in formats which best met their needs. These could take the form of either online access to a set of key reports or a paper-based distribution of reports to an agreed schedule. An important support mechanism is the development of an intranet as the vehicle for distributing information on both policy and procedures and providing access to key organisation information in a user-friendly format.

Mix of online access and printouts

The organisation had developed access to key reports online but also produced a set of printouts on withdrawals and retention (weekly) and enquiries (monthly).

Development and use of college intranet for publishing college procedures

The organisation makes extensive use of an intranet for publishing all procedures that are kept up to date. As a result, access to and awareness of procedures was high among staff.

Well-developed information desktop

The desktop information available via an organisation network was developed over five years. Originally available as a means to ensure data was challenged and corrected, it is now relied on as the source of all key organisation information. Organisational reliance is such that a move to a new Windows version of learner tracking software had been delayed to ensure that the new desktop would be of similar quality.

In summary

- Ongoing development of OI is a mainly people-focused activity.
- Communication is key to OI development.
- OI development should be based on organisation and staff need.
- OI development relies on staff development.

Status, function and location of the OI manager and information services staff

In the colleges visited as part of this study, there had been radical and sometimes frequent change to the staffing structure since incorporation. Although this was most evident in academic and senior management structures, which had generally become flatter, there had been considerable change in the business support structures operating within the colleges. In addition, many work-based learning providers now have to ensure that they meet the requirements of the Learning and Skills Council.

No two organisations in the study had identical structures but there were some common features.

- The information manager (or the person whose role included this function) normally occupied a post where they had fairly easy access to senior management; accountability to the senior management through the line manager was a key feature of the post.

OI manager is a middle manager but a member of the management team

Although at middle management level, the head of OI (together with the personnel manager) is a member of the management team. The college believes this ensures that all OI issues (eg data discrepancies) are dealt with at the college management team with support for the OI officer.

Information and data processing have single OI manager

A single information systems manager is responsible for data collection and information provision. The organisation believes this link through the manager is necessary to ensure the data input is aligned to the planned information output.

- Part of the structural development had, in all cases, seen a total separation of the information manager's responsibility from management of IT and technical services. There was recognition of the importance of the role and salaries often reflected this.

  Stable staffing in key positions

  The key managers in OI-related posts, the registrar, director of planning and head of MIS (here a technical post), work very closely together and have been retained in post throughout the key period post-incorporation. The value to college of this stability is recognised.

- Information managers were communicators with a sound knowledge of their institutions, including a detailed understanding of the course structure.
- All organisations had recognised the key role of examinations staff in data cleansing both at examination entry or registration and in the identification and recording of achievement. This internal audit function was recognised as a key role and had also resulted in some reappraisal of the location of examination staff in the structure.

In addition, they had given considerable thought to the impact of the information manager's day-to-day role on the effective working of the OI system, particularly on their:

- line manager
- physical location
- key working relationships
- relationship to the data-capture process.

Structure and geographical location of OI manager

The organisation has a small OI team (head plus two) reporting to the director of finance. Exams and admissions and marketing report to different directors but the structure is permeable. This is reinforced by the location of these functions in a central geographical location. This 'information centre' contains admissions, exams, the quality manager, accommodation / timetabling and the OI team.

Exams section placed under director of finance

The organisation considered the examinations section critical to ensuring clean data and maximising its funding. In its new structure the exams section was separated from other operations and placed under a funding manager reporting to the director of finance.

Many of the larger learning and skills providers had also developed strategies that identified support staff at department level with specific responsibilities for ensuring data quality. These staff were line managed either locally (eg by the department office manager) or by central staff. In all cases they acted as a 'conduit' between central data and information managers and teaching and training staff.

In summary

- Recognise the importance of the OI manager.
- The separation of the OI from the IT management role has benefited learning and skills providers.
- OI managers must be good communicators.

Relationship with suppliers

Learning and skills providers often complain that the software and hardware supplied to them does not live up to expectations. To overcome this it is vital that organisations are clear about what they require from their OI system before they approach suppliers. For example, one provider wanted software that was 'simple, immediate and networkable'. They resolved that they wanted to see actual software in a real working situation – not in development or in a demonstration.

Organisations emphasised the need to make sure that you are always well prepared before you meet any supplier.

A number of learning and skills providers had rejected the 'off-the-shelf' software solutions available in the market and commissioned their own software from external providers. This requires detailed systems analysis and specification, and also carries the risk of exposure should problems occur with software or should the provider go out of business. It also presupposes (or certainly would be assisted by) some programming ability in the in-house information team. The advantages identified by two learning and skills providers that went down this route lay in having software closely tailored to their needs and designed to be responsive to the culture and style of the organisation.

Ongoing relationships with suppliers in this situation need to be closely maintained at a professional level, especially where a complete proprietary system has been purchased. It is important to be proactive rather than passive and especially to be clear about the support available after delivery of the goods.

Relationships with suppliers can have positive and negative effects on the development of OI. Positively, the existence of a user group set up around a supplier's product gives the opportunity for an exchange of ideas on a regional or even national basis. Where a supplier is introducing a new product range, a group of learning and skills providers can form a consortium with each representative aiming to become expert in one area of the new product. This will give them the ability to cascade training and also act as a secondary source of ongoing practical information in addition to the supplier's own helpdesk.

Cost-effective solutions can be found if the OI team work closely with suppliers.

Computer leasing

In one learning and skills provider computer equipment is leased, not purchased. In addition to new machines that are added annually to the establishment, one-quarter of the computers are replaced every year as part of a four-year leasing cycle.

Campus agreement

One learning and skills provider has signed a campus agreement on software that is more cost effective than individual licences. It means that all staff (and all learners as a bonus) can use the software at a cost of approximately £10k per annum, with latest software updates provided automatically.

The installation of a new software solution, especially in an environment that has been carefully prepared for it, can help to spread expertise through the organisation. This happens both through the training provided to operate the new software and through the sense of expectation that arises out of what is perceived as a move forward.

Finally, as a warning, an example of the problems that can occur when the relationship with a supplier is not what it should be. In one learning and skills provider, a server and new software sat unused for many months as a result of the software supplier suggesting that, after all, another software solution, also marketed by the supplier, might be a better option.

In summary

- Prepare before meeting suppliers.
- Confirm ongoing support in writing.
- Consider the relative benefits of off-the-peg and bespoke software systems.
- Consider the relative benefits of leasing and buying hardware.
- Review the software agreements.

Payback

Good systems have 'payback' for participants. The range of benefits that comes from an effective OI system is one of the main selling points of the need for change and staff training to staff who may be cynical and reluctant.

A feature of the good practice observed was the recognition that in any data collection process there was an information 'payback' to those required to participate. Emphasis was given to the fact that data collection supported **organisation** information requirements not just management needs.

Having an OI strategy meant that project implementation did not focus solely on data collection issues or external data requirements. The need for a major system change was made more pressing by the need to improve internal information. There was also a recognition that OI would not develop unless staff could identify an obvious return for their participation.

Formative assessment tracking system

This provider had developed an in-house formative assessment tracking system. The system had been decentralised and team administrators carried out data input with teaching staff supplying assessment data. Managers used the system to ensure that teaching staff had submitted assessment plans and then that learner assessments were being set and assessment marks submitted.

Teaching and training staff were committed to the system, as they were able to access reports that included an individual learner 'late assignment' check and a check of learners who had not submitted work, by assignment.

Effective register systems may require considerable staff input during initial development. However, the ability to track learners' attendance and retention by consulting a series of screens on the organisation network rather than chasing paper and individual members of staff benefits many front-line staff.

Digital image capture

The provider had implemented a digital image capture system primarily to assist security. However, an information front end had been developed which allowed teaching staff to produce class lists that included learner images. It was also possible to search for learner image by name or part of name.

Another very powerful selling point for staff is that online data will reduce the numbers of forms they have to fill in and the requests they receive for information on learners.

Use of internal e-mail for reporting absence

A central absence log was implemented as part of a retention strategy.

- All learners contact a central number to notify their absence.
- Absence information is e-mailed to personal tutors.
- Teaching staff report all absences to personal tutor by e-mail.
- Learners with unauthorised absences are chased promptly by personal tutors.
- E-mail printouts are held on learners' files as audit evidence.

An additional payback is that online achievement, retention and destination information can cut much of the administrative workload for self-assessment. As we have seen elsewhere, one organisation produced all the data needed for inspection online and intends to maintain it, so that never again will an impending inspection require superhuman efforts to collect paper evidence.

In summary

- Good OI must offer a payback to encourage staff to use it.
- Learning and skills providers must actively promote the benefits of OI to staff.

Sources of good advice

It is easy for a provider to think that its problems are unique. Similarly, good practice in OI often stays within an individual college rather than being disseminated.

There is a huge pool of skills and experience within the learning and skills sector waiting to be tapped. Cooperation with other providers in regional consortia or twinning with local organisations is a good source of support. Don't feel constrained by locality when looking for partners – look in other regions.

Useful information

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LSC (2002) *Good practice : target setting : getting smarter.* Learning and Skills Council.

LSC (2003). *Circular 03/01 Success for all : implementation of the framework for quality and success.* Learning and Skills Council.

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Martinez P (2001). *Great expectations : setting targets for students.* Learning and Skills Development Agency.

NAO (2001). *Improving student performance : how English further education colleges can improve student retention and achievement.* National Audit Office.

Owen J (2002). *Benchmarking for the learning and skills sector.* Learning and Skills Development Agency.

www.successforall.gov.uk
Success for all website

raising quality and achievement programme

The first part of this plain English guide is intended to give learning and skills providers a starting point for reviewing their target-setting processes. It includes two health checks – one for colleges and one for work-based learning (WBL) providers and lists some of the key issues raised as a result of providers using the heath checks. The successful use of targets is intrinsically tied to good information systems and the second part of this guide covers information systems, setting out practical information and examples of good practice.

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